

FY 2020 Performance Data Form – *Overview and Reminders for Module 2 (Performance Measures)*

LIHEAP Webinar hosted by the Office of Community Services (OCS) in the Administration for Children and Families (ACF) presented by APPRISE under contract to OCS

January 5, 2021

Welcome:

Sharnice Peters (OCS)

Presenters:

Melissa Torgerson (Verve Associates)

Dan Bausch (APPRISE)



ADMINISTRATION FOR
CHILDREN & FAMILIES

Welcome

- **Purpose of This Webinar**

- To provide an overview of Module 2 (Performance Measures) of the LIHEAP Performance Data Form.
- To explain the key concepts for correctly completing the report.
- To provide guidance related to including households served with CARES Act funds.
- To highlight general reporting reminders.

- **Audience for This Webinar**

- Coordinators and other staff who have previously completed the Performance Measures.

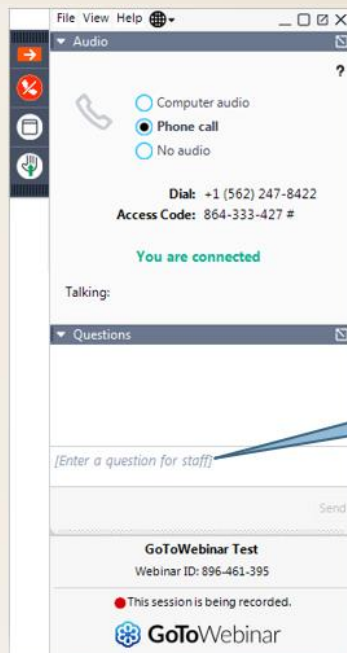
Webinar Overview

- **Structure of The Webinar**
 - 30-minutes to review key information.
 - **Slides available for download now** under “Handouts” in the GoToWebinar Sidebar.
 - The webinar is being recorded and will be published on the ACF YouTube channel.

GoToWebinar Question Box

- **Have a question?**

- You are encouraged to ask questions as you have them by typing them into the GoToWebinar “Question” box.
- Submitted questions will be reviewed and responded to at the end of the webinar or via an e-mail from APPRISE.



Enter text here to ask a question.

If the sidebar is minimized, it will look like this:

Click this button to expand sidebar.



Presenter(s):
Melissa Torgerson

Note on Submitting FY 2020 Reports

- The following reports were due on December 31, 2020.
 - The FY 2020 Household Report (with final data)
 - The FY 2020 Carryover and Re-allotment Report (with final data)
 - The SF-425 Federal Financial Reports
- An issue in OLDC prevented submissions of these reports for part of last week.
- This issue is now resolved. **Grantees should proceed with submitting their final reports.**
- If you have any issues, such as a report is listed as “in review by CO”, please contact your liaison.

FY 2020 Performance Data Form

Update on Status

- To allow OCS to monitor the use of CARES Act Funds, OCS is requesting changes to Module 1 (the Grantee Survey) of the Performance Data Form.
- Once these changes are approved and implemented in OLDC, OCS will issue the Action Transmittal and final due date for the FY 2020 Performance Data Form.
- APPRISE will schedule training webinars on Module 1 (the Grantee Survey) at that time.

Overview of Module 2

History and Purpose

- The Performance Measures have been submitted by state grantees since 2016 in Module 2 of the *LIHEAP Performance Data Form*.
- The Performance Measures provide measurable information on annual LIHEAP impacts and targeting performance, including:
 - LIHEAP Benefit Targeting
 - LIHEAP Energy Burden Reduction Impacts
 - LIHEAP Restorations of Lost Energy Service
 - LIHEAP Preventions of Imminent Energy Service Loss
- Data provide grantees with information to help with Performance Management.

FY 2020 Reporting & CARES

Any Changes to Reporting Requirements?

- There are no changes to Module 2 for FY 2020 reporting.
- The FY 2020 Performance Measures data fields and reporting requirements are the same as those used for the FY 2019 report.
- Grantees can download the prior instructions for reporting each item in the Performance Data Form here:
<https://www.acf.hhs.gov/ocs/policy-guidance/liheap-2020-01-performance-data-form-fy-2019>

FY 2020 Reporting & CARES

Guidance for CARES

- **Households provided with CARES benefits in FY 2020 should be included when preparing information for the Performance Measures report.**
- For the FY 2020 Performance Measures, grantees should:
 - Include households that received any federal LIHEAP assistance during FFY 2020. This includes households assisted with regular LIHEAP funds, LIHEAP CARES funds, or both.
 - Include regular and CARES-funded benefits when calculating the total benefit amounts households received and calculating the total average LIHEAP benefit amounts.

FY 2020 Reporting & CARES

Impact of CARES & Pandemic on Results

- **Grantees may see changes in their FY 2020 Performance Measures results because of the use of LIHEAP CARES funds or the impacts of the pandemic.**
- *Examples of CARES Impacts*
 - If you provided extra benefits to a larger portion of your clients, the average benefit amounts in your report will be higher.
 - If you targeted additional or new benefits for crisis situations, you may see a larger number of restoration or prevention occurrences.
 - If you served more households than normal, you may see other differences in the characteristics of households served.
- *Examples of Pandemic Impacts*
 - Because of utility shutoff moratoriums, you may also see changes compared to prior years, such as fewer occurrences where LIHEAP restored lost service.
 - You may see changes in the average annual income or the annual energy bills due to the economic and social impacts of COVID-19.

Reporting Rules for Module 2 (Performance Measures)



ADMINISTRATION FOR
CHILDREN & FAMILIES

Reporting Rules for Module 2

Section V: Energy Burden Targeting

- Grantees should...
 1. Identify all households provided with bill-payment assistance in FY 2020. This is reported in Part A.
 2. Identify the top energy vendors used by these clients.
 3. Collect annual main heating fuel bill information and electricity bill information from targeted vendors.
 4. For all households with annual main heating fuel bill AND electricity bill information, calculate the statistics in Part B.
 5. Calculate each household's energy burden and identify the top quartile (top 25%) of households with the highest calculated energy burden. Calculate and report the statistics in Part C.

Reporting Rules for Module 2

Sections VI and VII: Restoration and Prevention

- Grantees should...
 1. Identify all households provided with any type of LIHEAP assistance in FY 2020.
 2. Identify households that were assisted with LIHEAP during FY 2020 and who had energy service restored as a result of receiving assistance. This includes a benefit that reconnected utility service, provided a delivery, or repaired/replaced inoperable equipment. *Report the total count of occurrences in Section VI.*
 3. Identify households that were assisted with LIHEAP during FY 2020 and who had an imminent loss of energy service prevented as a result of receiving assistance. This includes a benefit that prevented disconnection, provided a delivery, or repaired/replaced failing equipment. *Report the total count of occurrences in Section VII.*

General Reporting Reminders



ADMINISTRATION FOR
CHILDREN & FAMILIES

Reminder #1:

Calculating Weighted Averages for “All Households”

- The “All Households” values provide the average values across all fuel types.
 - Because the number of households with each main fuel type is different, you must calculate the “All Households” column using a **weighted average**. You cannot calculate these values by doing a simple average of the five main heating columns.
 - *For more information on weighted averages, see the document on [Calculations for the Performance Measures](#).*
- Grantees have two main options to correctly calculate the averages in the “All Households” column.

Common Reporting Issues

Reminder #1 – Calculating Weighted Averages in the “All Households” Column

- **Option 1:** Use the Excel form that automatically calculates the “All Households” weighted averages based on the information entered for each heating fuel type.
 - An [Excel workbook](#) of the Performance Data Form will auto-calculate the “All Households” column for you once you enter data into the main-heat fuel columns.
- **Option 2:** Calculate the averages directly in your data system using all of the household-level data in your database.
 - Use all households included in Part B to calculate the averages.

Common Reporting Issues

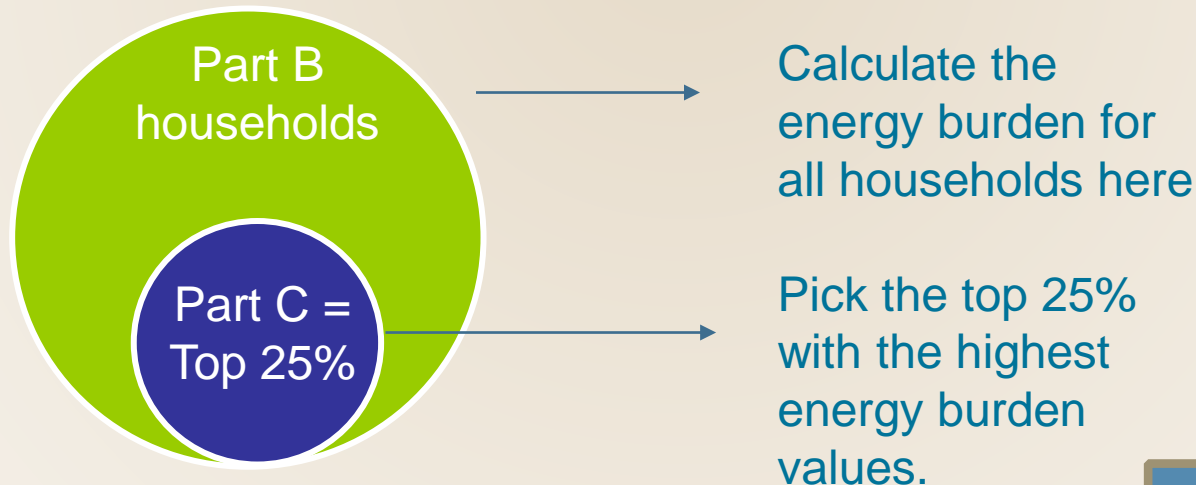
Reminder #2 – Reporting Prevention and Restoration Data

- The number of Restoration or Prevention occurrences should reflect all types of LIHEAP assistance where a benefit restored lost energy service (Section VI) or prevented the loss of service (Section VII).
 - This generally includes Crisis assistance households, but it should also include any household where a regular, non-emergency benefit restored service or prevented loss.
- A household might have had the loss of energy service prevented or had energy service restored more than once in a year. In that case, you should report each occurrence, rather than counting a household only once.

Common Reporting Issues

Reminder #3 – High Burden Household Identification

- For Section V, Grantees need to identify “High Burden” households according to the instructions.
- Definition for High Burden Households:
 - The top 25% of households (e.g. the top quartile) from Part B with the highest calculated energy burden values.



Common Reporting Issues

Reminder #3 – High Burden Household Identification

- **Step 1:** For each household included in Part B, calculate the household's *annual total residential energy bill*.
 - Add the annual main heating bill and annual electricity bill together.
 - Verify that the electricity bill doesn't get double-counted when calculating the annual residential energy bill.

Household ID	Main Heating Fuel	Annual Main Heating Bill	Annual Electricity Bill	Annual Total Residential Energy Bill
Household 1	Propane	\$2,800	\$1,200	\$4,000
Household 2	Fuel Oil	\$1,500	\$1,500	\$3,000
Household 3	Electricity	\$1,200	\$0	\$1,200
Household 4	Natural Gas	\$1,000	\$800	\$1,800
Household 5	Electricity	\$1,000	\$0	\$1,000

Note:
Correct -
Electricity bill
was not double-
counted.

Presenter(s):
Dan Bausch

Common Reporting Issues

Reminder #3 – High Burden Household Identification

- **Step 2:** Calculate *energy burden* for each of these households.

$$\frac{\text{Household's Total Annual Residential Energy Bill}}{\text{Household's Annual Income}} * 100$$

- **Step 3:** Assign a value of 100% energy burden to households with income equal to \$0 or with an *annual total residential energy bill* that is larger than the household's annual income.
- **Step 4:** Sort the combined set of ALL households from highest to lowest energy burden.
- **Step 5:** Draw the top 25% of households with the highest energy burden, *regardless of fuel type*.

Common Reporting Issues

Reminder #3 – High Burden Household Identification

Household ID	Main Heating Fuel	Annual Income	Step 1: Annual Total Residential Energy Bill	Step 2: Energy Burden
Household 5	Electricity	\$0	\$1,000	100%
Household 2	Fuel Oil	\$10,000	\$3,000	30%
Household 1	Propane	\$16,000	\$4,000	25%
Household 8	Natural Gas	\$10,000	\$1,500	15%
Household 7	Fuel Oil	\$24,000	\$2,400	10%
Household 6	Electricity	\$10,000	\$800	8%
Household 3	Electricity	\$15,000	\$1,200	8%
Household 4	Natural Gas	\$30,000	\$1,800	6%

Step 5:
Top 25%
Selected

Step 3: Zero-
Income Household
was assigned 100%
energy burden

Step 4: Households
sorted by energy burden

Presenter(s):
Dan Bausch

Final Reminders



ADMINISTRATION FOR
CHILDREN & FAMILIES

Final Reminders

Resources and Review Process

Resource: Check Before You Submit

- This resource was created to help grantees with checking their Section V data prior to submission:
https://liheappm.acf.hhs.gov/sites/default/files/private/grantee_tools/best_practices/LIHEAP-PDF-Section-V-Before-You-Submit-Document.pdf

Data Checks After You Submit

- APPRISE checks data following submission in OLDC and will e-mail grantees to alert them to any issues or questions based on their review.
- When your report is confirmed as complete, your liaison will accept it in OLDC.
- If you later identify a correction or change is needed, you will need to submit a revision in OLDC.

Final Reminders

FY 2020 Report Status and Deadline

- The FY 2020 Performance Data Form will be made available in OLDC once proposed changes to Module 1 (the Grantee Survey) are finalized. The revised due date will be announced at that time.
- **There are no changes to Module 2 for FY 2020 reporting.** The FY 2020 Performance Measures data fields and reporting requirements are the same as those used for the FY 2019 report. Grantees are encouraged to prepare their FY 2020 Performance Measures reports now to be ready for submission.
- Remember that your report information must be:
 - Entered in OLDC
 - Saved in OLDC
 - Certified by the appropriate person
 - Submitted by the appropriate person

Final Reminders

OLDC Resources

- OLDC is accessed through Grant Solutions.
- Log-in to Grant Solutions at <https://www.grantsolutions.gov/gs>
- Once logged in, click “OLDC” in the top taskbar to access the OLDC homepage.
- If you need assistance, please contact Grants Center Of Excellence Systems Help Desk:
 - (202) 401-5282 or (866) 577-0771
 - help@grantsolutions.gov

Final Reminders

Performance Measures Resources

- **Prior FY 2019 Performance Data Form AT and Instructions:**
<https://www.acf.hhs.gov/ocs/policy-guidance/liheap-2020-01-performance-data-form-fy-2019>
- **Performance Measures Resources & Data Reliability Assessment Tools (log-in required):**
<https://liheappm.acf.hhs.gov/performance-measures/>
- **“Check Before You Submit” Document:**
https://liheappm.acf.hhs.gov/sites/default/files/private/grantee_tools/best_practices/LIHEA_P-PDF-Section-V-Before-You-Submit-Document.pdf
- **Past Years’ Performance Measures Data:**
https://liheappm.acf.hhs.gov/data_warehouse/index.php?report=homepage

Final Reminders

Reports and Training Webinars

- Performance Measures – Step-by-Step Overview
 - January 19 at 3 PM ET
 - 90-minutes for detailed review of all reporting items
- Module 1 (Grantee Survey)
 - Webinars will be scheduled once the proposed changes for CARES reporting are finalized.

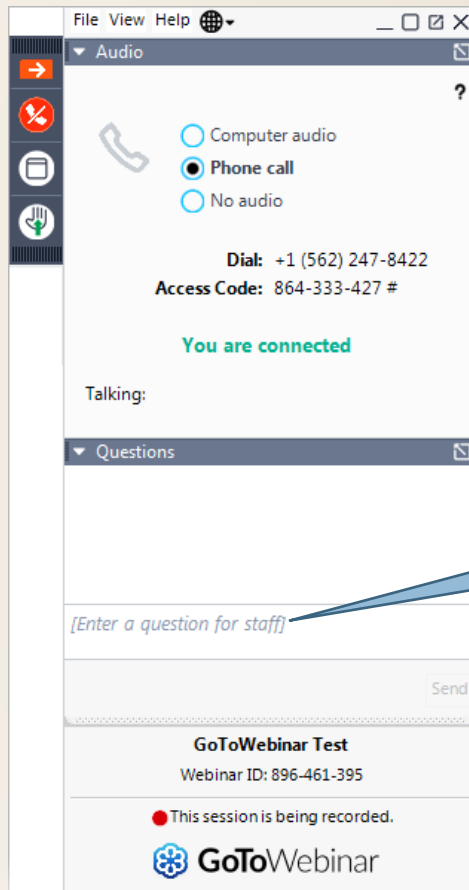
Final Reminders

Support Resources

- OCS liaisons
 - <https://www.acf.hhs.gov/ocs/contact-information/liheap-contact-information-division-energy-assistance-federal-staff>
- Grants Center Of Excellence systems Help Desk
 - help@grantsolutions.gov
 - (202) 401-5282 or (866) 577-0771
- APPRISE Team
 - Daniel Bausch, Daniel-Bausch@appraiseinc.org; 609-252-9050
 - Jorge Mancilla, Jorge-MancillaUribe@appraiseinc.org; 609-252-9009
 - Pragya Chauhan, Pragya-Chauhan@appraiseinc.org; 609-252-9057
 - Thomas Hanes, Tom-Hanes@appraiseinc.org; 609-252-9055
 - Melanie Huang, Melanie-Huang@appraiseinc.org; 609-252-9059
 - Alex Richwine, alex-richwine@appraiseinc.org; 609-252-9053
 - Melissa Torgerson, melissa@verveassociates.net

Presenter(s):
Melissa Torgerson

GoToWebinar Question Box



Enter text here to ask a question.

If the sidebar is minimized, it will look like this:

Click this button to expand sidebar.



Audience Poll Question #1

QUICKPOLL

How confident are you that you understand how to correctly complete the FY 2020 Performance Measures?

Please select one:

- **Not at all Confident**
- **Not Too Confident**
- **Somewhat Confident**
- **Very Confident**

Submit

